



Hancock Software®

Hancock

Adding Measures Training

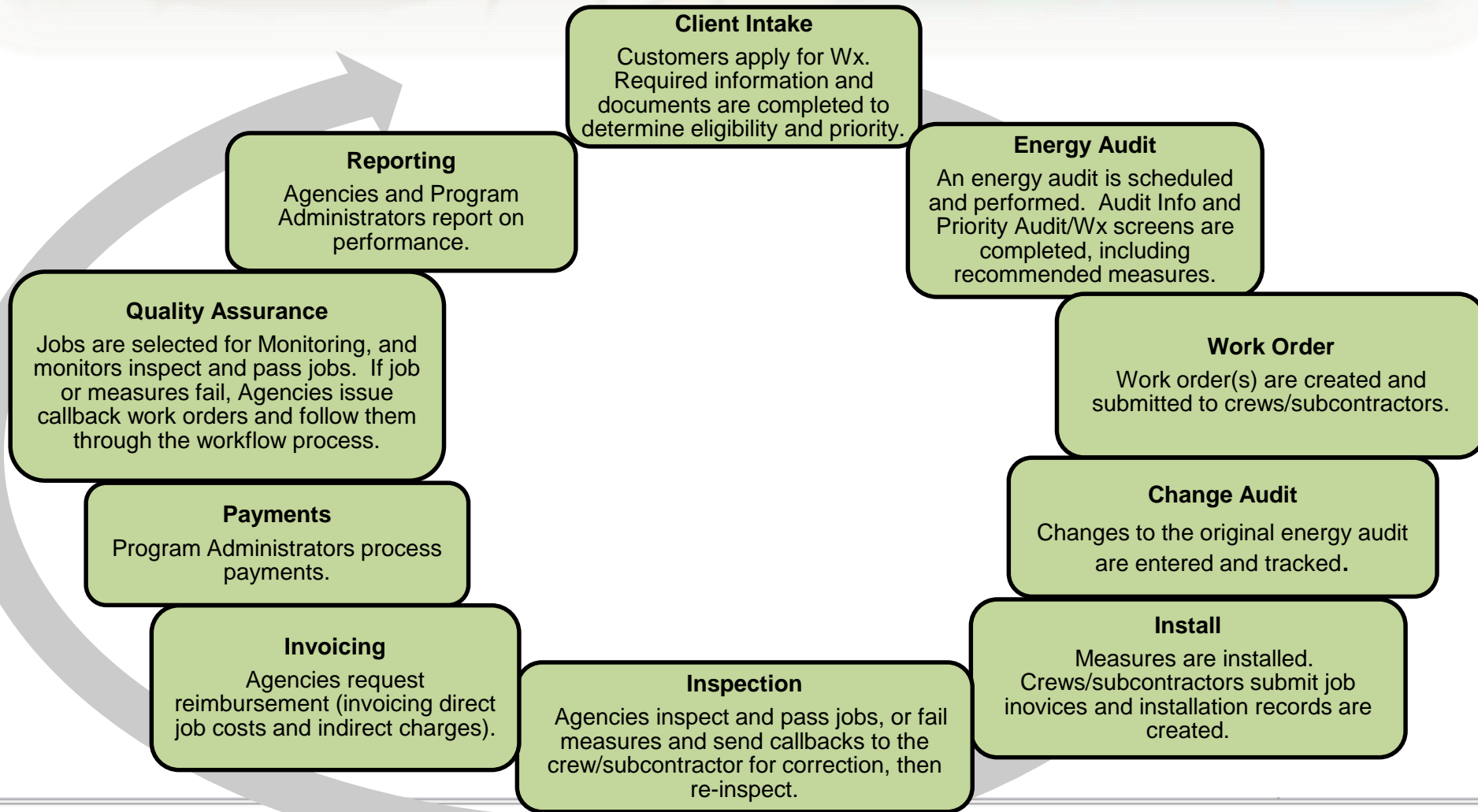
Presented by:
Teresa Lewis

Agenda

- Welcome
 - General
 - Audit Information
 - Adding measures



WAP Online Workflow



General Enhancements

Vendor Licenses

- New system check - vendors with expired licenses go to State Approval



Client Intake

Client Information

- Primary Heating-very important to be able to complete the energy consumption.

Energy Consumption

- Formerly Fuel Usage
- New fields to break down usage by Heating, Cooling, DHW and Baseload
- Directly related to Heating and Cooling, DHW and Lighting-Our area-H-41%, C-7%,
- DHW-17% and Baseload-35%,



Energy Consumption Information

Note: To be able to replace or repair a unit , you will need to put heating and cooling usage, even if the heating is mainly gas. I have an excel spreadsheet where all you have to do is input the KWH for month and it will do all the calculations for you. Then you just input in Hancock.

KWH	X12	17%	7%	35%
1619	19428	3302.76	1359.96	6799.8

HEAT Enterprise

HOME

▼ CLIENT INTAKE

Client Information

Energy Consumption

Family

Income

Documents

Employment Verification

▼ WAP

Client Job List

Audit Information

Priority Audit

Selected Measures

▶ WEATHERIZATION

▶ BASELOAD

▶ HOT WATER

▶ WORK ORDER

Upload Photo

Energy Consumption Information

Utility Usage Monthly Usage

Utility Georgia Power - Atlanta (Elec)

Account No 25632-54215 ☐ No Account#

Date 08/14/2015

Name on Account TRAINING UPGRADE ☒ Same Name

Utility Allowance

☒ Annual Energy Usage 30,192.00 Kwh ☐ Monthly Energy Usage

☒ Heating Usage 1.00 Kwh ☒ DHW Usage 5253.41 Kwh

☒ Cooling Usage 12800.41 Kwh ☒ BaseLoad Usage 12137.18 Kwh

Fuel Usage for Heating is in use

Fuel Usage for Cooling is in use

* indicates a required field

Note:

Account number is required, if no account number is available then check the No Account # checkbox.

Annual energy usage field requires the amount of fuel used in the appropriate fuel unit. Gallons for Oil, CCF for Natural Gas, tons for coal, gallons for kerosene, cords for wood, gallons for propane, kwh for electricity.

Save Cancel Save & Close



Energy Consumption Information

This screen is Natural Gas. Note there is a question mark at the right side of the screen, under the logout button that is a help screen.

Energy Consumption Information			
Utility Usage		Monthly Usage	
Utility	City of Douglas (NG)		
Account No	16345	<input type="checkbox"/> No Account#	
Date	08/14/2015		
Name on Account	TRAINING UPGRADE	<input checked="" type="checkbox"/> Same Name	
Utility Allowance	0.00		
<hr/>			
<input checked="" type="radio"/> Annual Energy Usage	700.00	CCF	<input type="radio"/> Monthly Energy Usage
<input checked="" type="checkbox"/> Heating	Usage	700.00	CCF
<input type="checkbox"/> DHW	Usage		CCF
Fuel Usage for Heating is in use Fuel Usage for DHW has been assigned * indicates a required field			
Note: Account number is required, if no account number is available then check the No Account # checkbox. Annual energy usage field requires the amount of fuel used in the appropriate fuel unit. Gallons for Oil, CCF for Natural Gas, tons for coal, gallons for kerosene, cords for wood, gallons for propane, kwh for electricity.			
<div> <input type="button" value="Save"/> <input type="button" value="Cancel"/> <input type="button" value="Save & Close"/> </div>			



Audit Enhancements

Audit Information

- New Weather Location Fields
- House Dimensions – Sq. Ft and Cu. Ft

Export Job

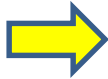
- Client and Job information can be exported to a printable Excel spreadsheet



Audit Information

Click on audit information on left of screen

Audit Information Screen



AUDIT INFORMATION TRAINING UPGRADE

If you hover over the clients name it will have a box with Priority eligibility, Client #, Address and job number. There should be an excel icon that you can click on and it will transfer to excelspreadsheet.

Site Assessment

First Name	TRAINING	Last Name	UPGRADE
WAP Priority	3	Agency	CONCERTED SERVICES INC.
Job Number*	369808596	Auditor*	OHNATHAN STRICKLAND
Job Type	Weatherization	Job Status*	Audited
Assessment Date	08/14/2015	Reweather. Date	
Complete Date	None	Furnace Tech	
Audit Type	Priority Audit / Other		
<input type="checkbox"/> Reweathering <input type="checkbox"/> Need Approval			
<input type="checkbox"/> Denied			

Nearest Weather Location

State	Georgia	Location	Savannah
-------	---------	----------	----------

House Information

House Type*	Wood Frame Home with Crawl Space and Open Joist Attic
DHW Heating	Electric
Basement Type	Crawl Space
# of Smokers&Pets	
# of Woodstoves	
# of Fireplaces	
# of Unvented Heaters	
# of Bedrooms	3
Year Built*	1968
	<input type="checkbox"/> Knob&Tube
	<input type="checkbox"/> Asbestos
	<input type="checkbox"/> Lead Paint
	<input type="checkbox"/> Moisture Problems
	<input type="checkbox"/> VOC
	<input checked="" type="checkbox"/> Built before 1979



Important Message



Audit Information



Historic Preservation Review


Historic Preservation Status 106 Activities ☐ PA Work Scope

Air Leakage

Location Shielding Leakage

House Dimensions

Actions	Length	Width	Height	Sq. Ft	Cu. Ft	Floor #
 	50	35	8	1750.00	14000.00	1

 Records: 1 - 1 of 1

First Floor SF 1,750
Total SF 1,750
Total Heated Volume 14,000

• indicates a required field

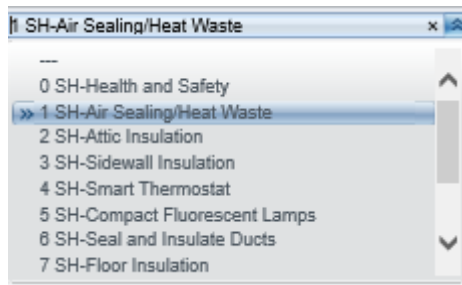
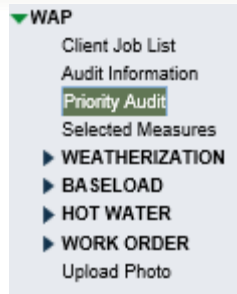


Sample sheet for your surveyor's to complete. We don't have basements down here, so I didn't put it on my sheet.

PRIORITY AUDIT			
NAME OF CLIENT: _____			
DATE: _____		AUDITOR: _____	
HOUSE TYPE:			
WOOD FRAME HOME W/CRAWL SPACE & OPEN JOIST ATTIC			
WOOD FRAME HOME W/SLAB FOUNDATION & OPEN JOIST ATTIC			
WOOD FRAME HOME W/POST FOUNDATION & OPEN JOIST ATTIC			
BLOCK, CONCRETE OR LOG HOME W/SLAB FOUNDATION & OPEN JOIST ATTIC			
MOBILE HOME W/POST FOUNDATION			
DHW HEATING:		# OF SMOKERS & PETS	
NATURAL GAS---		# OF WOOD STOVES	
PROPANE		# OF FIREPLACES	
ELECTRIC		# OF UNVENTED HEATERS	
OTHER		# OF BEDROOMS	
BASEMENT TYPE:		KNOB & TUBE	
CRAWLSPACE---		ASBESTOS	
SLAB		LEAD PAINT	
		MOISTURE PROBLEMS	
		BUILT BEFORE 1979	
AIRLEAKAGE:		HOUSE DIMENSIONS	
LOCATION:		1ST FLOOR	2ND FLOOR
ATTIC		LENGTH	
WALL		WIDTH	
UNIFORM		HEIGHT	
SHIELDING:			
PROTECTED			
NORMAL			
EXPOSED			
LEAKAGE:			
SMALL CRACKS--			
NORMAL			
LARGE HOLES---			



Choose Priority Audit on Left of screen. On top of page chose Priority group and chose one from drop down (site built, mobile home and other measures). Then chose Priority drop down and chose priority item that fits your measure. This one I chose Air Sealing/Heat Waste. When this screen opens you will need to insert Target CFM50 (I use 2500). If you forget to put this you will receive an error message stating (Target CFM50 must be greater than zero). Then you can click on select measure tab, then the round green circle with + in it. Now you can add measures.



AIR INFILTRATION PATRICIA LOFTON

Pre-test/Post-test Building Ventilation **Select Measure** Comment

Target CFM50* 2500.00 CFM50 Reduction 0.00 (%)

Pre-test

Actions	Test	Final Pre	Direction	Ring Type	House Pressure @ (pa)	Fan Pressure (pa)	CFM _s	CFM _r	ACH
There are no records available.									

Records: 0 - 0 of 0

Post-test

Actions	Test	Final Post	Direction	Ring Type	House Pressure @ (pa)	Fan Pressure (pa)	CFM _s	CFM _r	ACH
There are no records available.									

Records: 0 - 0 of 0

* indicates a required field

Close Print View Photo Upload Photo



Heating and Cooling Dashboard

Don't forget to use your help **question** symbol. For Priority, chose heating and cooling and then click on heating/cooling dashboard. To add a measure hit the add button at the bottom.

Priority Group: Mobile Home Priority: 8 MH-Heating and Cooling

Heating/Cooling Dashboard

Act	#	Measure	Section	Quantity	Unit	Unit Cost	Labor Cost	Total Cost
There are no records available.								

Records: 0 - 0 of 0

Heating/Cooling Dashboard

HEATING/COOLING DASHBOARD TRAINING UPGRADE

Heating/Cooling Systems

Actions	System	Pre Heating	Pre Cooling	Post Heating	Post Cooling
	Heating 1	73% AFUE (15%)		73% AFUE (15%)	
	Cooling 1		14.43 SEER (85%)		14.43 SEER (85%)
	Heating Cooling 1	6 HSPF (100%)	14.43 SEER (100%)	6 HSPF (100%)	14.43 SEER (100%)
Total		115%	185%	115%	185%

Records: 1 - 3 of 3

Cumulative Usage Ratio for each section must equal 100 percent

Distribution Systems

Actions	System	Pre Efficiency	Post Efficiency	Heating 1	Cooling 1	Heating Cooling 1
	Distribution 1	93%	93%	YES	YES	

Records: 1 - 1 of 1

At least one Heating/Cooling system is present that is not associated with any Distribution system.

Close Add Thermostat Settings Print View Photo Upload Photo

If none of the little round dots is filled in, that usually means you need to go back to your energy consumption tab and set the percentages. Then you can go back and add system. You will need to choose existing system because there isn't any measures setup for NEW. You will need to add HVAC system information to be able to input measures for the zonal distribution system.

The screenshot shows a software interface titled 'Heating/Cooling Dashboard'. A sub-header reads 'HEATING/COOLING DASHBOARD - DIANE BIRSON'. Below this is a section titled 'Heating Cooling System'. The main area contains several radio button options: 'Zonal Distribution System', 'Existing Heating System', 'New Heating System', 'Existing Cooling System', 'New Cooling System', 'Existing Heating&Cooling System', and 'New Heating&Cooling System'. A yellow arrow points to the 'Existing Heating&Cooling System' option. Below the options, a message box contains the following text: 'Records, Heating records, Heating&Cooling records can't be added since the energy consumption screen is incomplete. Please add the utility records and the annual fuel consumption on the [Energy Consumption](#) page. Make sure the total annual fuel consumption is broken up among the household appliances. Zonal Distribution System cannot be added without Heating or Cooling system. Please add Heating, Cooling or Heating&Cooling System first.' At the bottom of the dialog is a 'Cancel' button.



Existing Heating and Cooling System

Don't choose Heat Pump, it will not give you measures to choose from.

Heating/Cooling Dashboard

Edit Heating and Cooling

Existing Heating&Cooling System

System Name* Heating Cooling 1 --- Heating ----- --- Cooling -----

Utility* Georgia Power - Atlanta (8) Usage Ratio* 100 % Usage Ratio* 100 %

System Type* Heat Pump Heating Output (BTU/Hour) Cooling Output (BTU/Hour)

Type* Electric HSPF 6 SEER 14.5 (14.43)

System Age* (years) 1 Heat Rise °F ☐ Removed

Select Measure

Actions	Measure	Unit Cost	Quantity	Unit
	replace heat pump	4,500	1	1

+ Records: 1 - 1 of 1

Post Value

--- Heating ----- --- Cooling -----

Usage Ratio* 100 % Usage Ratio* 100 %

Heating Output (BTU/Hour) Cooling Output (BTU/Hour)

HSPF 6 SEER 14.43

System Comment

* indicates a required field



SEER/HSPF

- **SEER (Seasonal Energy Efficiency Ratio)**

SEER is the measure of efficiency by which the cooling process of air conditioners and heat pumps is rated. The higher the SEER number, the greater the efficiency, which yields greater energy savings. The SEER is defined as the total cooling output (in British thermal units or Btu) provided by the unit during its normal annual usage period divided by its total energy input (in watt-hours) during the same period. For cooling products sold on the market today, the government requires a minimum SEER rating of 13.0, but if you have an older piece of cooling equipment, you may be operating with a SEER rating as low as 8.0...which means that you're wasting a lot of energy and money. Consider this: for every \$100 you pay to cool your home this summer at an 8.0 SEER, you would get the same amount of cooling AND save \$42 if you were operating at 14.0 SEER.

- **HSPF (Heating Seasonal Performance Factor)**

HSPF is the measurement used to gauge the heating efficiency of heat pumps. (A heat pump's cooling efficiency is measured by its SEER). The higher the HSPF number, the greater the efficiency and cost-savings. HSPF is a seasonal measure (meaning that it takes into account the fact that the heat pumps rarely for as long as is optimal during Spring and Fall). HSPF can be thought of as the "averaged factor" for an entire heating season. HSPF is calculated by taking the total annual heating requirements, including all energy inputs (defrost and back-up heating energy included) divided by the total electric power used. The industry standard rating system compares BTUs of heat output to watts of electrical energy consumed. There are 3.4 BTUs per watt of electricity; an HSPF of 6.8 corresponds roughly with an averaged factor of 2. Today's models of heat pumps are required to have a minimum 6.8 HSPF. Newer heat pumps manufactured after 2005 are required to have an HSPF of at least 7.7. The most efficient heat pumps have an HSPF of 10.



Cooling System

Note: The usage ratio between the Heating and Cooling system has to equal 100%.
My cooling is 85% and if you look at the next slide you will see my heating is 15% usage ratio.

Heating/Cooling Dashboard

HEATING/COOLING DASHBOARD - TRAINING UPGRADE

Edit Cooling

Existing Cooling System

System Name*

Cooling 1

Utility*

Georgia Power - Atlanta (Elec)

System Type*

Central Air/AC

Type*

Electric

Usage Ratio*

85

%

Cooling Output

(BTU/Hour)

SEER*

14.5

(14.43)

System Age (years)*

1

☐ Removed

Select Measure

Actions	Measure	Unit Cost	Quantity	Unit
There are no records available.				

+

Records: 0 - 0 of 0

Post Value

Usage Ratio*

85

%

Cooling Output

(BTU/Hour)

SEER*

14.43

System Comment

* indicates a required field

Save

Cancel



Heating System

Heating/Cooling Dashboard

HEATING/COOLING DASHBOARD - TRAINING UPGRADE

Edit Heating

Existing Heating System


System Name*


Utility* Usage Ratio* % Heating Output (BTU/Hour)

System Type* Heat Rise °F Efficiency* % (AFUE: 73 %)

Type* ☐ Removed

Select Measure

Actions	Measure	Unit Cost	Quantity	Unit
	Clean & Tune	250	1	

 Records: 1 - 1 of 1

Post Value

Post Efficiency* % (AFUE: 73 %) Usage Ratio* % Heating Output (BTU/Hour)

System Comment

* indicates a required field



AFUE

- **AFUE (Average Fuel Utilization Efficiency)**

AFUE is the standard measurement of efficiency for gas and oil-fired furnaces. Given in percentages, this number tells you how much of your fuel is used to heat your home and how much fuel is wasted. The higher the AFUE rating, the greater the efficiency. If a furnace has a rating of 80% AFUE rating, the furnace converts 80% of the fuel that you supply to heat — the other 20% is lost out of the chimney. The most efficient furnaces in the industry have AFUE ratings of up to 96.7%. If you have an older furnace (with an AFUE of approximately 60%), you could save up to 40% on your heating bills by replacing it with a new high efficiency furnace! The cost to replace your old, inefficient furnace is paid back through lower utility bills.



Audit Enhancements

Zonal Distribution

- Combination distribution system support
 - Heating and Cooling systems can share a single distribution system
- BPI Distribution System Characteristics support including:
 - Quantity, Percent within Envelope, Duct Leakage, Duct Insulation (outside envelope)
 - Pre-Efficiency is automatically calculated based on BPI Duct Efficiency Tables
- ASHRAE 152-04 Support
 - Record CFM Supply and Return test results (Pressure Pan testing)



Please click on add button on the bottom of screen to add Zonal Distribution. Once you do that the second screen will appear, click on zonal distribution system.

Heating/Cooling Dashboard

HEATING/COOLING DASHBOARD TRAINING UPGRADE

Heating/Cooling Systems

Actions	System	Pre Heating	Pre Cooling	Post Heating	Post Cooling
	Heating 1	73% AFUE (15%)		73% AFUE (15%)	
	Cooling 1		14.43 SEER (85%)		14.43 SEER (85%)
	Heating Cooling 1	8 HSPF (100%)	14.43 SEER (100%)	8 HSPF (100%)	14.43 SEER (100%)
	Total	115%	185%	115%	185%

Records: 1 - 3 of 3

Cumulative Usage Ratio for each section must equal 100 percent

Distribution Systems

Actions	System	Pre Efficiency	Post Efficiency	Heating 1	Cooling 1	Heating Cooling 1
	Distribution 1	93%	93%	YES	YES	

Records: 1 - 1 of 1

At least one Heating/Cooling system is present that is not associated with any Distribution system.

Close Add Thermostat Settings Print View Photo Upload Photo



Heating/Cooling Dashboard

HEATING/COOLING DASHBOARD TRAINING UPGRADE

Heating Cooling System

☒ Zonal Distribution System

☐ Existing Heating System ☐ New Heating System

☐ Existing Cooling System ☐ New Cooling System

☐ Existing Heating&Cooling System ☐ New Heating&Cooling System

Cooling records, Heating records, Heating&Cooling records can't be added since the energy consumption screen is incomplete. Please add the utility records and the annual fuel consumption on the [Energy Consumption](#) page. Make sure the total annual fuel consumption is broken up among the house's appliances.
Zonal Distribution System cannot be added without Heating or Cooling system. Please add Heating, Cooling or Heating&Cooling System first.

Cancel



Zonal Distribution

You will have to complete all information with red asterisks and then click on + button to add measures.

Edit Zonal Distribution

Duct Efficiency Model: ☒ BPI ☐ ASHRAE 152-04

Existing Distribution System

System Name*
Distribution 1

Family Type
Single Family

System Type*
Ducts

Efficiency*
93 %

Quantity*
50 (Ft)

Percent Within Envelope*
Greater than 90%

Duct Leakage*
No observable leaks

Duct Insulation (outside envelope)
R-4 to R-7

Select Measure

Actions	Measure	Unit Cost	Quantity	Unit
	Duct Sealing	50.00	1	

+ Records: 1 - 1 of 1

Post Value

Post Efficiency*
93 %

This distribution system is used by:

System

☒ Heating 1
☒ Cooling 1
☐ Heating Cooling 1

System Comment

Either 1 Heating, 1 Cooling, 1 Heating & 1 Cooling or 1 Heat Pump system can be associated with a Distribution system

* indicates a required field

Save Cancel



This is the screen for adding duct sealing or duct work.

Air seal air handler and plenum
Duct Insulation R-11 Wrap
Duct Pressure Balancing
Duct Repair
Duct Sealing
HS-Install Ductwork
Pipe Thawing
PO-Install Ductwork
Repair registers and returns

Heating/Cooling Dashboard

HEATING/COOLING DASHBOARD - DIANE PIERSON

Heating Cooling System

Existing Distribution System





System Name*


Family Type

System Type*

Efficiency* %

Select Measure

Actions	Measure	Unit Cost	Quantity	Unit
 	Duct Sealing	26.75	1	
 	Duct Sealing	37.33	1	

 Records: 1 - 2 of 2

Post Value

Post Efficiency* %

This distribution system is used by:

System

☐ Heating 1

System Comment

Either 1 Heating, 1 Cooling, 1 Heating & 1 Cooling or 1 Heat Pump system can be associated with a Distribution system

* indicates a required field




Once you hit save on this page, you may receive this message, if so just click on box next to Heating 1 at bottom of screen and then hit save again.

Heating/Cooling Dashboard

HEATING/COOLING DASHBOARD - DIANE PIERSON

Heating Cooling System

 At least one Heating or Cooling system must be associated with a Distribution system

Existing Distribution System





System Name*


Family Type

System Type*

Efficiency* %

Select Measure

Actions	Measure	Unit Cost	Quantity	Unit
 	Duct Sealing	28.75	1	
 	Duct Sealing	37.33	1	

 Records: 1 - 2 of 2

Post Value


Post Efficiency* %

This distribution system is used by:

System

☐ Heating 1

System Comment



Either 1 Heating, 1 Cooling, 1 Heating & 1 Cooling or 1 Heat Pump systems can be associated with a Distribution system

* indicates a required field



Domestic Hot Water Screen

DOMESTIC HOT WATER HEATER testing 3 testing 3

Hot Water Tank

Actions	Name	Utility	Usage Ratio	Size (gallons)	Pre EF	Post EF	Measure	Total Cost
---------	------	---------	-------------	----------------	--------	---------	---------	------------

There are no records available.

Name* Utility* Usage Ratio*

Size (gallons)* Pre EF* Pipe Length

Temperature (*F)

H₂O Inlet Temp 74.89 °F Pre Usage Post Usage

Comment

Measure

Name Cost Quantity

Post EF

Comment

* indicates a required field

Records: 0 - 0 of 0



Domestic Hot Water Heater

Domestic Hot Water Heater

DOMESTIC HOT WATER HEATER
 DIANE PIERSON

Hot Water Tank

Actions	Name	Utility	Usage Ratio	Size (gallons)	Pre EF	Post EF	Measure	Total Cost
There are no records available.								
							+	Records: 0 - 0 of 0

Hot Water Measures

Actions	Measure	Unit Cost	Quantity	Unit	Saving %	Annual Saving	SIR	Install Date
There are no records available.								

Measure*

Unit Cost*

Total Material Cost

Comment

Adjust water heater thermostat 120°

Adjust water heater thermostat 120°

HS_Replace DHW Tank

HS_Retro Water Heater Blanket

HS_Retro-Insulate 6" Hot & Cold water lines

HS-Water Heater Vent

Low-flow showerhead

PO_Replace DHW Tank

PO-Insulate 6" Hot & Cold water lines

Additional Information

Saving %


Install Date

* indicates a required field

Records: 0 - 0 of 0



When you first open your Hancock, this page will come up first, here are the names and phone numbers of persons who can help you with questions and if they can't, they will let you know and then you can call Alfreda for help.

 **Hancock Software®**

Program Notice: Due to new reporting requirements from DHS, GEFA will require all applicants (last

HEAT Enterprise

HOME

CLIENT

- Add Client
- Client List
- Multifamily List

JOB

- Client Status Report
- Job Process Report
- Job List

WORKFLOW

VENDOR/CREW

- Vendor/Crew List
- Personnel

INVOICING

- Invoice List
- View Invoice

REPORTING

- Budget Balance
- Adjust Budget
- Production And Job Cost
- District Reports
- System Reports
- Wage Approval

ARRA

- ARRA Survey Reports
- ARRA Subrecipient Reports
- Recipients (DMR1512)

HOME

News

Hancock Software's Georgia WAP Online Version 5

May 30, 2014 Update:

***As of May 1, 2013 GEFA will be providing all Help Desk support for agencies (per the bulletin posted on March 24, 2013). If you have any questions, please contact the following individuals:

Teresa Lewis
Concerted Services, Inc.
912-285-6085
tlewis@concertedservices.org

Sharonda Ladd
West Central
478-472-3609
sharondawcg@windstream.net

Tracy Brown
Tallatoona Community Action
678-721-9391 Ext 109
tracyb@tallatoonacap.org

BEST-PRACTICE

When contacting Super-Users or GEFA for software help, please include the following information:

- The client, job or invoice # you are having a problem with
- The screen name where the problem is encountered
- A description of what you were trying to do
- A description of the problem (if the problem is related to an error message you receive, please provide the full error message)

Important Message





Hancock Software®

Hancock Invoice Training

Presented by:
Tracy Brown

The total cost is a way to check to see if you are balanced for that client.

HEAT Enterprise
HOME
 ▼ CLIENT INTAKE
 Client Information
 Energy Consumption
 Family
 Income
 Documents
 Employment Verification
 ▼ WAP
 Client Job List
 Audit Information
 Priority Audit
 Selected Measures
 ► WEATHERIZATION
 ► BASELOAD
 ► HOT WATER
 ► WORK ORDER
 Upload Photo

Other Measure	1	202.03	0.00	202.03	DOE REG 2015-2016	04/28/2016
Infiltration	1	776.64	0.00	776.64	DHS-HHS_2015-2016	04/28/2016
Infiltration	1	116.34	0.00	116.34	DOE REG 2015-2016	04/28/2016
Infiltration	1	48.49	0.00	48.49	DHS-HHS_2015-2016	04/28/2016
Infiltration	1	363.66	0.00	363.66	DOE REG 2015-2016	04/28/2016
Infiltration	1	202.03	0.00	202.03	DOE REG 2015-2016	04/28/2016
Attic 1	1	727.35	0.00	727.35	DHS-HHS_2015-2016	04/28/2016
Interior Lighting	1	45.22	0.00	45.22	DOE REG 2015-2016	04/28/2016
Hot Water	1	105.05	0.00	105.05	DOE REG 2015-2016	04/28/2016
Other Measure	1	1,200	0.00	1,200.00	DHS-HHS_2015-2016	04/28/2016
Other Measure	1	1,200	0.00	1,200.00	DOE REG 2015-2016	04/28/2016

Total Cost 5,773.92
 Funding Source Inspection Date
 1: This value has been amended
 Work Order Print Report

Hancock Software
 Try our mobile Energy /

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- From the funding source for each item, choose the contract that you want charged for that item from the drop down box.
- Then click “save.”

Inspection Date

Funding Source



Comment

* indicates a required field

1	Weatherstrip/Insulate attic hatch	Infiltration	1	202.03
---	--------------------------------------	--------------	---	--------



Total Cost 5,773.92

Funding Source Inspection Date

1: This value has been amended

Work Order

Print Report



Hancock Software®

Try our mobile Energy Audit

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Important Message



HOME

▼ CLIENT INTAKE

Client Information
Energy Consumption
Family
Income
Documents
Employment Verification

▼ WAP

Client Job List
Audit Information
Priority Audit
Selected Measures

► WEATHERIZATION

► BASELOAD

► HOT WATER

▼ WORK ORDER

Work Order

Installation

Inspection

Upload Photo

Agency Tallatoota CAP, Inc.

Work Order Date

Vendor

Search

Actions	Job Number	Work Order Date	Status	First Name	Last Name	Vendor	Total Amount(\$)	Callback	W.O. Issuer
	119970441	03/29/2016	Inspected	Kawana	Walker	JOHN ANDERSON HEAT AND AIR	5,773.92	No	Tracy Brown
	Contains	Equal To	Contains	Contains		Equal To	Contains		
Records: 1 - 1 of 1 - Pages: << < 1 > >> (out of 1)									



Important Message



- Under work order, put the work order date and then choose from the list of vendors that are applicable at the bottom of the screen.

Work Order Details

Job Number 119970441 Client Number 119970441 Client Name Kawana Walker Callback ☐

Work Order Date* 03/29/2016 Scheduled Date Target CFM 2450

Comment

Measure	Vendor	Order Quantity	Unit	Order Price	Order Labor Cost	Total Order Cost
Attic Airsealing	JOHN ANDERSON HEAT AND AIR	1.00		776.640000	0.00	776.
Blown in FG R-19	JOHN ANDERSON HEAT AND AIR	1.00		727.350000	0.00	727.
Caulking cracks	JOHN ANDERSON HEAT AND AIR	1.00		116.340000	0.00	116.
Caulking cracks	JOHN ANDERSON HEAT AND AIR	1.00		48.490000	0.00	48.
CFL Replacement	JOHN ANDERSON HEAT AND AIR	1.00		45.220000	0.00	45.
Door Sweeps	JOHN ANDERSON HEAT AND AIR	1.00		363.660000	0.00	363.
PO-Contractor's Labor Only	JOHN ANDERSON HEAT AND AIR	1.00		1200.000000	0.00	1,200.

Print Options

☒ Include Costs ☒ Photos ☐ Sort Work Order by Priority ☐ Include Air Infiltration information

* indicates a required field

Cancel Print E-Mail



HEAT Enterprise

HOME

▼ CLIENT INTAKE

Client Information
Energy Consumption
Family
Income
Documents
Employment Verification

▼ WAP

Client Job List
Audit Information
Priority Audit
Selected Measures

► WEATHERIZATION

► BASELOAD

► HOT WATER

▼ WORK ORDER

Work Order
Installation
Inspection
Upload Photo



INSTALLATION Kawana Walker

Agency
Contact Install Date
Vendor

Search

Actions	Job Number	Install Date	Status	First Name	Last Name	Total Amount(\$)	Callback	Vendor
	119970441	04/28/2016	Inspected	Kawana	Walker	5,773.92	No	JOHN ANDERSON HEAT AND AIR
	<input type="text" value="Contains"/>	<input type="text" value="Equal To"/>	<input type="text" value="Contains"/>	<input type="text" value="Contains"/>	<input type="text" value="Equal To"/>			

Records: 1 - 1 of 1 - Pages: << < 1 > >> (out of 1)

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- Enter the install date.

Installation Details

Information Measures

Job Number	119970441	Client Number	119970441	Client Name	Kawana Walker	Callback	<input type="checkbox"/>
Vendor	JOHN ANDERSON HEAT AND AIR						
Agency	Tallatoona CAP, Inc.						
Work Order Date	03/29/2016						
Comment	<div></div>						
Installation Date*	<div>04/28/2016</div>						

* indicates a required field

Cancel View Photo Upload Photo



HEAT Enterprise

HOME

▼ CLIENT INTAKE

Client Information
Energy Consumption
Family
Income
Documents
Employment Verification

▼ WAP

Client Job List
Audit Information
Priority Audit
Selected Measures

► WEATHERIZATION

► BASELOAD

► HOT WATER

▼ WORK ORDER

Work Order
Installation
Inspection
Upload Photo

INSPECTION Kawana Walker

Agency Inspector Inspection Date Vendor

Actions	Job Number	Inspection Date	Status	First Name	Last Name	Total Amount(\$)	Failed	Call Back	Vendor
	119970441	04/28/2016	Inspected	Kawana	Walker	5,773.92	No	No	JOHN ANDERSON HEAT AND AIR
	<input type="text" value="Contains"/>	<input type="text" value="Equal To"/>	<input type="text" value="Contains"/>	<input type="text" value="Contains"/>	<input type="text" value="Equal To"/>	<input type="text" value="Equal To"/>			

Records: 1 - 1 of 1 - Pages: << < 1 > >> (out of 1)

1: This value has been amended



Important Message

- Enter the scheduled inspector from the drop down box.



- Then enter in the final inspection date.



Inspection Detail

Inspection Detail		Measure					
Job Number	119970441	Client Number	119970441	Client Name	Kawana Walker	Callback	<input type="checkbox"/>
Vendor	JOHN ANDERSON HEAT AND AIR		Work Order Date	03/29/2016			
Agency	Tallatoona CAP, Inc.		Install Date	04/28/2016			
Schedule Inspector*	Donnie Ford		Date	04/28/2016			
Comment	<div></div>						

* indicates a required field

Cancel Agency QC Form Entire Job Agency QC Form



At the top of “measure” screen you will see pass or fail. Choose pass and then click set and the click save at bottom of page.

Inspection Detail

Inspection Detail Measure

Record Status of All Measures

Actions	Measure	Quantity	Install Cost	Unit Cost	Install Labor Cost	Install Total Cost	Inspection Quantity	Inspection Unit Cost
	2 F Air	1	310.3		0	310.30	1	310.3
	Ca	1	5.67		0	5.67	1	5.67
	CP	1	15.94		0	15.94	1	15.94
	Lo shower/rear	1	3.58		0	3.58	1	3.58
	PO-Install Smoke/CO Alarm	1	31.3		0	31.30	1	31.3
	PO-Water Heater Blanket	1	19.26		0	19.26	1	19.26
	Replace broken glass	1	40.93		0	40.93	1	40.93
	Replace faucet	1	2.14		0	2.14	1	2.14

• indicates a required field



- Now you are ready to start the invoicing process.

HEAT Enterprise

HOME

▼ **CLIENT**

Add Client

Client List

Multifamily List

▼ **JOB**

Client Status Report

Job Process Report

Job List

► **WORKFLOW**

Job Assignment

▼ **VENDOR/CREW**

Vendor/Crew List

Personnel

▼ **INVOICING**

► **Invoice List**

View Invoice

▼ **REPORTING**

Budget Balance

Adjust Budget





















Production And Job Cost

District Reports

System Reports

DOE Reports

Wage Approval

Actions	Number	Status	Agency	Direct Cost (\$)	Indirect Cost (\$)	Total Cost (\$)	Source	Invoice Date
 	08288	Submitted	Tallatoona CAP, Inc.	17,671.96	14,697.14	32,369.10	Multiple	04/30/2016
 	08273	Submitted	Tallatoona CAP, Inc.	18,735.60	19,202.93	37,938.53	Multiple	04/30/2016
 	08209	Paid	Tallatoona CAP, Inc.	25,010.46	17,511.04	42,521.50	Multiple	02/29/2016
 	08178	Paid	Tallatoona CAP, Inc.	30,457.01	19,274.43	49,731.44	Multiple	01/31/2016
 	08146	Paid	Tallatoona CAP, Inc.	36,489.33	26,234.56	62,723.89	Multiple	12/31/2015
 	08105	Paid	Tallatoona CAP, Inc.	23,432.07	29,630.34	53,062.41	Multiple	11/30/2015
 	08056	Paid	Tallatoona CAP, Inc.	19,217.41	19,733.60	38,951.01	Multiple	09/30/2015
 	08014	Paid	Tallatoona CAP, Inc.	24,740.27	20,132.45	44,872.72	Multiple	08/31/2015
 	07970	Paid	Tallatoona CAP, Inc.	42,958.08	21,651.41	64,609.49	Multiple	07/31/2015
 	07933	Paid	Tallatoona CAP, Inc.	11,718.52	5,358.15	17,076.67	Multiple	06/30/2015

Records: 1 - 10 of 83 - Pages: << < 1 | 2 | 3 | 4 | 5 > >> (out of 9)

1: This value has been amended

Invoice Date* 06/05/2016

* indicates a required field

Submit Detailed Invoice

Logout

Click on the plus sign to add a new invoice.

> **ADD INVOICE**

Creating Invoice Number 08327


Agency Tallatoona CAP, Inc.

Total Direct Costs (\$) 0.00 Total Indirect Costs (\$) 0.00 Invoice Total (\$) 0.00

Manage Jobs on Invoice (Direct Costs)

Actions	Job Number	First Name	Last Name	Address	Funding Source	Contract Year	Job Cost(\$)	Total Cost(\$)	Photo
There are no records available.									

Records: 0 - 0 of 0








Under “end date” put the month in that you are claiming.

Do not choose funding source, this way it will include all funding sources used.

Add Jobs

 End Date*  Job Number Funding Source

First Name Last Name Street 

Contract Year*

* indicates a required field

Agency Tallatoona CAP, Inc.

☐ Select All

<input checked="" type="checkbox"/>	Action	Job Number	First Name	Last Name	Address	Job Cost	Total Cost
There are no records available.							
Records: 0 - 0 of 0 - Pages: << < 1 > >> (out of 0) <input type="text" value=""/>							
<input type="button" value="Save"/> <input type="button" value="Cancel"/> <input type="button" value="View Incomplete Jobs"/>							



- Click on search to see a list of clients for the month you are invoicing for.
- Either select all or check each name individually for those that you want added for the month claiming.
- Then save
- Once the names are saved it will automatically go back to the invoicing page.

Add Jobs

End Date*  Job Number Funding Source 

First Name Last Name Street

Contract Year*

* indicates a required field

Agency Tallatoona CAP, Inc.

 ☐ Select All



<input checked="" type="checkbox"/>	Action	Job Number	First Name	Last Name	Address	Job Cost	Total Cost
There are no records available.							
Records: 0 - 0 of 0 - Pages: << < 1 > >> (out of 0) <input type="text"/>							
<input type="button" value="Save"/> <input type="button" value="Cancel"/> <input type="button" value="View Incomplete Jobs"/>							




- Once you are finished choosing your clients you will then add your indirect costs.

Indirect Costs on Invoice (expand/contract)


Actions	Budget Type	Funding Source	Program Year	Bill Date	Bill Amount(\$)	Description
There are no records available.						

Records: 0 - 0 of 0



* indicates a required field

Note: To delete an invoice, please return to the Invoice List and Select 'Delete'

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



- Choose each indirect budget type that applies from the drop down box.

Indirect Costs on Invoice (expand/contract)

Actions	Budget Type	Funding Source
		

Records: 0 - 0 of 0


  * indicates a required field




Admin
 Liability Insurance
 Program Support
 Ramp Up Activities
 T/TA
 Veh & Equip


- Enter the funding source for the contract you want to charge these costs to.

Funding Source Program Year Bill Date

 There are no records available.





ACTION - EARTHCENTS REBATE
 ACTION-Pinewood Apartments
 AGLR
 CAFI- Calvary Phase II
 CAFI-Calvary Phase I
 CAFI-SH Proj 30700
 CAFI-SHENANDOAH
 CAFI-StM Proj 30710



... List and Select 'Delete'

- The Program has been 2013
- Enter in the amount for the budget type that you have chosen. [Ex.admin](#)

Program Year	Bill Date	Bill Amount(\$)	Description
no records available.			
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>



- Indirect Costs on Invoice (expand/contract)

Comment:

* indicates a required field

[Complete & Return to Invoice List](#)
[Detailed Invoice](#)
[Attach File](#)
[View Invoice](#)



Export Panel:   



Invoice Report

Report Created: 6/5/2016

Agency: Tallatoona CAP, Inc.
Address: P.O. Box 1480
Cartersville 30120
Contact: Scott Gray
Phone: 770-607-2222
Fax: 770-607-2224

Invoice Number: 08178
Invoice Date: 01/31/2016
Comment:

Job Summary

Reportable Jobs	5
Rework jobs	0
Common Area Jobs	0
Jobs	5

Budget Type Summary

Labor Costs	\$0.00
Program Operations Labor	\$11,900.00
Program Operations Materials	\$18,557.01
Install Cost(sub total)	\$30,457.01
Admin	\$5,499.44
Program Support	\$11,916.30
T/TA	\$1,858.69
Total Invoice	\$49,731.44



- Click on the “view invoice” to get your budget reports.
- These must also be signed and uploaded with other required documentation.
- You will have a budget report for each contract that you are claiming expenses for.
- *See example for budget reports on next slide.*

Indirect Costs on Invoice (expand/contract)

Budget Type	Funding Source	Program Year	Bill Date	Bill Amount(\$)	Description
Admin	DOE REG 2015-2016	2013	01/31/2016	3,217.21	
T/TA	DOE REG 2015-2016	2013	01/31/2016	182.82	
Program Support	DOE REG 2015-2016	2013	01/31/2016	5,387.62	
Admin	DHS-HHS_2015-2016	2013	01/31/2016	631.00	
Program Support	DHS-HHS_2015-2016	2013	01/31/2016	1,037.12	
Admin	DOE REG 2014-2015	2013	01/31/2016	1,651.23	
T/TA	DOE REG 2014-2015	2013	01/31/2016	1,675.87	
Program Support	DOE REG 2014-2015	2013	01/31/2016	5,491.56	

Records: 1 - 8 of 8

Comment:

* indicates a required field

[Complete & Return to Invoice List](#)

[Detailed Invoice](#)

[Attach File](#)

[View Invoice](#)



Export Panel:   

WEATHERIZATION ASSISTANCE PROGRAM



REQUEST FOR PAYMENT & STATISTICAL REPORT

Report Created: 6/5/2016

Invoice Number: 08178
 Provider: Tallatoona CAP, Inc.
 Address: P.O. Box 1480
 Cartersville GA 30120
 Phone: 770-607-2222

Program Year: 2013
 Contact Person: Scott Gray
 Report Date: 06/05/2016
 State: GA
 Fax: 770-607-2224

Contract No: DOE-EE0006147
 Grant: DOE REG 2014-2015

Zip: 30120
 E-Mail: scottg@tallatoonacap.org

Cost Category	Total Budget	Previously Requested Amount	This Period Requested Amount	Current Year Budget Remaining	Current Carry Over Remaining	Previous Carry Over Remaining	Advance	Contract Remaining	Total Requested To Date	Contract Amount Remaining	This Period Payment (Invoice Amount)
Admin	\$8,751.24	\$7,100.01	\$1,651.23	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$8,751.24	\$0.00	\$1,651.23
T/TA	\$3,000.00	\$1,324.13	\$1,675.87	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$3,000.00	\$0.00	\$1,675.87
Program Operations Materials	\$26,171.27	\$22,422.83	\$3,748.44	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$26,171.27	\$0.00	\$3,748.44
Health & Safety	\$13,641.35	\$13,641.35	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$13,641.35	\$0.00	\$0.00
Veh & Equip	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Liability Insurance	\$3,333.34	\$3,333.34	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$3,333.34	\$0.00	\$0.00
Ramp Up Activities	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Program Operations Labor	\$32,752.44	\$30,402.44	\$2,350.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$32,752.44	\$0.00	\$2,350.00
Program Support	\$56,324.74	\$50,833.18	\$5,491.56	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$56,324.74	\$0.00	\$5,491.56
Total	\$143,974.38	\$129,057.28	\$14,917.10	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$143,974.38	\$0.00	\$14,917.10

Certification I certify that all expenditures requested above were made in accordance with the contractual agreement with DHCD for administration of the Weatherization Assistance Program.



- Click on “attach file” to upload all required documentation.
- After you attach your files click on complete and return to invoice list. Note: In the Comments put the month and year of invoice.

Indirect Costs on Invoice (expand/contract)

Budget Type	Funding Source	Program Year	Bill Date	Bill Amount(\$)	Description
Admin	DOE REG 2015-2016	2013	01/31/2016	3,217.21	
T/TA	DOE REG 2015-2016	2013	01/31/2016	182.82	
Program Support	DOE REG 2015-2016	2013	01/31/2016	5,387.62	
Admin	DHS-HHS_2015-2016	2013	01/31/2016	631.00	
Program Support	DHS-HHS_2015-2016	2013	01/31/2016	1,037.12	
Admin	DOE REG 2014-2015	2013	01/31/2016	1,651.23	
T/TA	DOE REG 2014-2015	2013	01/31/2016	1,675.87	
Program Support	DOE REG 2014-2015	2013	01/31/2016	5,491.56	

Records: 1 - 8 of 8

Comment:

* indicates a required field




Complete & Return to Invoice List

Detailed Invoice

Attach File

View Invoice



Attachment List (read only)		
Actions	File Name	Comment
	January 2016 GEFA Reporting Forms.pdf	
	January 2016 Combustion Safety Test Sheets.pdf	
	January 2016 Quality Control Checklist.pdf	
Records: 1 - 3 of 3		
Close		

Your screen will show the following options for attachments:

****Browse***

****Select***

****Upload***

****Save***

****Close*** (once all needed files have been uploaded)

▼ INVOICING

Invoice List

View Invoice

▼ REPORTING

Budget Balance

Adjust Budget

Production And Job Cost

District Reports

System Reports

DOE Reports

Wage Approval

▼ ARRA

ARRA Subrecipient Reports

Recipients (OMB1512)

Invoice Number	Status	Recipient Name
07933	Paid	Tallatoona CAP, Inc.

Records: 1 - 10 of 83 - Pages: << < 1 | 2 | 3 | 4 | 5 > >> (out of 9)

1: This value has been amended

Invoice Date* 06/05/2016

* indicates a required field

Submit Detailed Invoice

Hancock Software®

- Once you have uploaded all required documents you are now ready to submit your invoice.
- Enter in the last day of the month you are claiming under “invoice date”
- Click “submit”

Please see next screen for a list of all required monthly documents

REQUIRED DOCUMENTATION

- GEFA reporting spreadsheet (new version)
 - * Include copies of all documentation you are invoicing for.
 - * Examples: Invoices for Administrative Charges, Subcontractor Expenses, Crew Labor & Warehouse Inventory (Labor & Material Purchases), T/TA & Liability Insurance, Program Support.
- Combustion Safety Test Sheets
- Quality Control Checklist
- Signed Copy of Invoice Report
- Request for payment forms (Signed Copy Budget Forms)
- Ledger Report from your accounting system
- NEAT/MHEA Audit Forms

Email GEFA spreadsheet to:
wapinvoices@gefa.ga.gov

